Editing Account Details / Making Changes

My personal information is not accurate. How do I edit my information?
Log into your account. Select the "My Profile" box.
The "View and Edit Your Profile" button is in the bottom right corner.
Please review all 5 Tabs (Personal, Contact Info, Business, Lifecycles and Other).
Click "Save Changes to Person" at the bottom right corner.

Why is there a Primary and Secondary Account listed? Is there a difference?
The system allows two adult member listings per account. Both the Primary and Secondary listings have individual information and independent access to the account. The Primary listing has the ability to "set" the level of editing permissions for all members on the account.

How do I change the primary adult listing?
There is a "switch" button listed just above the boxes for the primary and secondary listings and it will "swap" the order on the account.

Can I use the same information for multiple people in my family?
Duplicates cause system errors in the reporting function. Each person on the account should be listed with his/her/other's separate email address and phone number. If you don't want to list individual info, please keep the field blank, do not list the same details for multiple people.

I changed my information, but the new details are not listed.
The system does not automatically update accounts or files. Any changes need to be **SAVED** in each section. The update information button is in the bottom right corner of the screen.